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FinancialPlanning

Wealthtech Weekly

November 13, 2025

By Rob Burgess
Reporter

AI note-takers have become commonplace among advisors. But clients could be capturing the meeting as well, especially given the rise in wearable AI recording devices. Though regulation often lags behind innovation, I asked advisors and experts about what they're seeing on the ground, and about the legal and ethical requirements for both sides of the equation.

Have any of your clients recorded your meeting with one of these devices? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

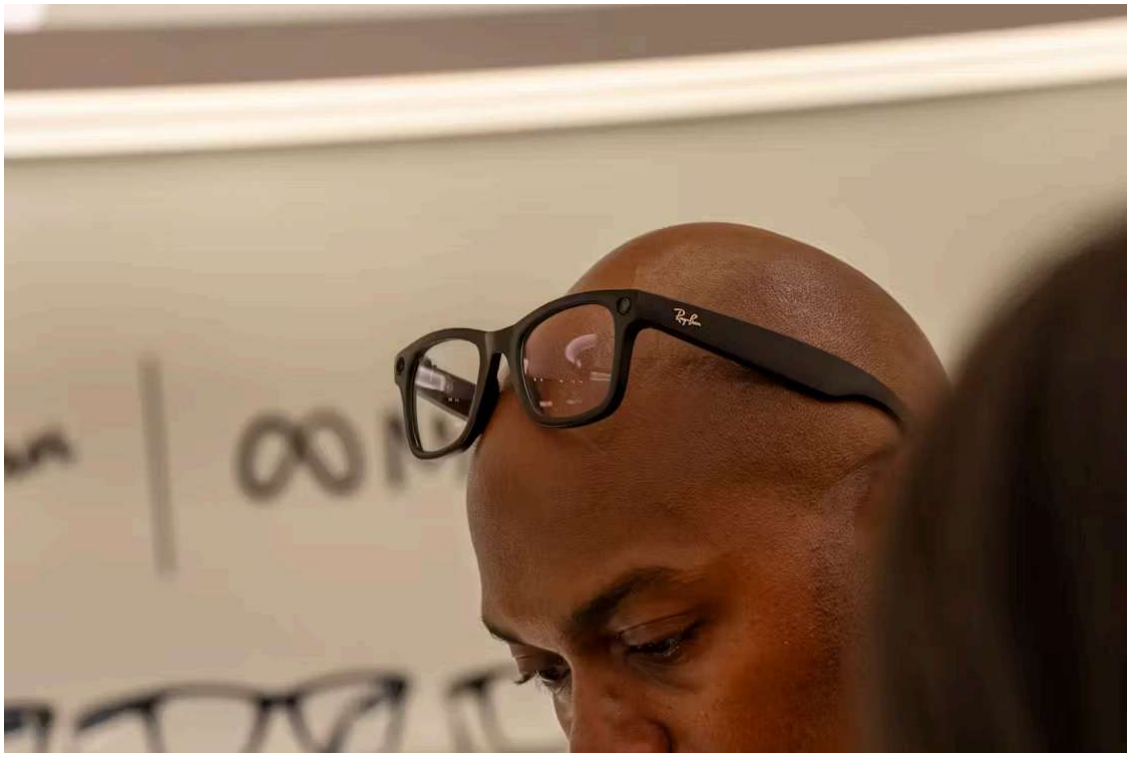
As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

You're recording the meeting. Is your client, too?



AI note-takers have become increasingly common among advisors. So has the use of wearable AI recording devices among the general population. What happens when the tables are turned?

- **The unexpected ways AI note-takers 'accelerate' client connections**
  Time savings is generally understood to be among the main advantages of AI note-takers. But advisors who have incorporated them into their practices said the benefits go much deeper.

- **From serving the country to serving clients: Vets in financial planning**
  Transitioning from military to civilian life has its own challenges, but these veterans used their backgrounds to their advantage in their new lives as financial advisors.
- **Using agentic AI to spend better — not just more — time with clients**
  New tools go beyond simple automation. They're helping advisors deliver more meaningful value in client meetings.
- **A new Financial Planning experience, designed for today's advisors**
  Our redesign makes finding news to grow and scale your firm easier than ever.

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